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Oilseeds and Products

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Report Highlights:

Following record production of 6.57 million MT in 1999, French oilseed production in 2000 is expected to fall to 5.91 million MT, due to reduced EU payments to oilseed growers. U.S. exports to France of soybeans and soybean meals decreased significantly from 1997/98 to 1998/99, due mainly to cheaper-priced Brazilian and Argentinian product and the weaker Euro. However, the GMO controversy may have also adversely affected imports from the United States. The French oilseed sector is working on ways to handle a potential ban on meat meals in animal feed in France and Europe. According to its estimates, a ban on meat meals in the EU would increase soybean meal imports by 10 percent for use in animal feed.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

Following a record crop at 6.57 million MT in 1999, French oilseed production is expected to decrease by 10 percent to 5.91 million MT in 2000, including 4 million MT rapeseed, 1.68 million MT sunflower seed, and 230,000 MT soybeans. This is due mainly to reduced EU payments to oilseed growers, set by the Agenda 2000 CAP reform. French imports from the United States were significantly hurt by cheaper Brazilian and Argentinian product and by the strong dollar relative to the Euro. In response to French consumer concerns about genetically-altered products, the French industry has set up a domestically grown GMO-free soybean production, which totaled 55,000 MT in 1999 and is expected to amount to 135,000 MT in 2000, as well as GMO-free soybean sector traced from Brazil. French imports of GMO-free Brazilian products are likely to amount to 180,000 MT in 2000.

Section I: Situation and Outlook

France is a major market for soybeans and soybean meal. However, in MY 1998/99, U.S. exports of soybeans to France declined by 27 percent from 1989/98, while the U.S. market share fell from 54 percent to 8 percent. At the same time, U.S. exports of soybean meal declined sharply from 41-percent market share to almost nil. This was mainly due to the high dollar rate, which made U.S. products expensive compared to Brazilian and Argentinian products. These products partially replaced U.S. products on the French market. The GMO controversy may also have had some impact.

Genetically engineered crops continue to be a key-issue in France and Europe. In order to respond to consumer concerns, the French industry organized two GMO-free soybean sectors. One is based on domestically-grown soybean called "Soja de Pays," which accounted for 20 percent of the French soybean production in 1999 (55,000 MT), and is expected to increase to 60 percent of the production in 2000 (135,000 MT). The second sector consists of tracing soybean from Brazil to France, and is likely to be 180,000 MT in 2000. (See FR0024)

The increasing number of sanitary measures taken at the French and EU level to prevent Bovine Spongiform Encephalopathy (BSE) from spreading further in Europe have raised the question whether meat meals should be totally banned from animal feed rations. In France, meat meals are still used in hog and poultry feed, but banned from ruminant feed. French oilseed growers have calculated that replacing meat meals by plant meals would require either a 30-percent increase in the area planted to oilseeds in Europe, or a 10-percent increase in imports of soybean meal. Consequently, the demand for American soybeans and soybean meal is likely to be growing in future years, despite the European fear for transgenic crops.

France is the leading oilseed producer in the EU, with 6.57 million MT produced in 1999, i.e., 42 percent of the total EU production. France's production in 1999 included 4.4 million MT rapeseed, 1.91 million MT sunflower seed, and 260,000 MT soybeans. The forecast for 2000 is for a decline to 5.91 million MT, including 4 million MT rapeseed, 1.68 million sunflower seed, and 230,000 MT soybeans. This is mainly due to decreasing EU payments to oilseed growers, aimed to be at the level of payments for grain producers in 2002.

The French oilseed industry just opened a web site that is all in French but which contains up-to-date statistics on French and EU oilseed markets: <http://www.prolea.com>

Section II: Statistical Tables

PS&D Tables

Oilseeds

PSD Table						
Country	France					
Commodity	Oilseed, Rapeseed				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Planted	1140	1140	1370	1355	0	1250
Area Harvested	1140	1140	1370	1355	0	1250
Beginning Stocks	0	0	110	110	175	175
Production	3700	3700	4400	4400	0	4000
MY Imports	40	40	55	55	0	50
MY Imp. from U.S.	18	18	0	0	0	0
MY Imp. from the EC	22	22	35	30	0	30
TOTAL SUPPLY	3740	3740	4565	4565	175	4225
MY Exports	2347	2347	2700	2650	0	2500
MY Exp. to the EC	1800	1800	1620	1575	0	1500
Crush Dom. Consumption	1103	1103	1300	1400	0	1200
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	180	180	390	340	0	350
TOTAL Dom. Consumption	1283	1283	1690	1740	0	1550
Ending Stocks	110	110	175	175	175	175
TOTAL DISTRIBUTION	3740	3740	4565	4565	175	4225
Calendar Year Imports	43	47	55	50	0	50
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	2270	2423	2700	2500	0	2500
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Area Planted	805	805	830	830	0	800
Area Harvested	805	805	830	830	0	800
Beginning Stocks	33	33	162	202	300	522
Production	1680	1680	1910	1910	0	1680
MY Imports	407	396	180	155	0	150
MY Imp. from U.S.	14	14	15	15	0	15
MY Imp. from the EC	7	7	14	5	0	5
TOTAL SUPPLY	2120	2109	2252	2267	300	2352
MY Exports	497	503	460	430	0	500
MY Exp. to the EC	476	476	450	425	0	450
Crush Dom. Consumption	1357	1320	1400	1250	0	1300
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	104	84	92	65	0	70
TOTAL Dom. Consumption	1461	1404	1492	1315	0	1370
Ending Stocks	162	202	300	522	0	482
TOTAL DISTRIBUTION	2120	2109	2252	2267	0	2352
Calendar Year Imports	415	370	400	200	0	150
Calendar Yr Imp. U.S.	15	28	15	15	0	15
Calendar Year Exports	415	391	400	450	0	500
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	111	111	100	100	0	90
Area Harvested	111	111	100	100	0	90
Beginning Stocks	55	55	16	16	16	6
Production	280	280	260	260	0	230
MY Imports	547	547	560	500	0	550
MY Imp. from U.S.	223	223	230	200	0	180
MY Imp. from the EC	50	50	50	50	0	50
TOTAL SUPPLY	882	882	836	776	16	786
MY Exports	21	21	20	20	0	20
MY Exp. to the EC	21	21	20	20	0	20
Crush Dom. Consumption	462	462	410	450	0	440
Food Use Dom. Consump.	30	30	30	30	0	30
Feed,Seed,Waste Dm.Cn.	353	353	360	270	0	280
TOTAL Dom. Consumption	845	845	800	750	0	750
Ending Stocks	16	16	16	6	0	16
TOTAL DISTRIBUTION	882	882	836	776	0	786
Calendar Year Imports	530	603	600	550	0	550
Calendar Yr Imp. U.S.	190	264	350	200	0	180
Calendar Year Exports	20	18	15	20	0	20
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oilseed, Peanut				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Beginning Stocks	10	10	5	0	5	0
Production	0	0	0	0	0	0
MY Imports	55	25	70	30	0	30
My Imp. from U.S.	10	7	10	10	0	10
MY Imp. from the EC	15	5	15	5	0	5
TOTAL SUPPLY	65	35	75	30	5	30
MY Exports	2	2	3	2	0	2
MY Exp. to the EC	2	2	3	2	0	2
Crush Dom. Consumption	8	2	12	3	0	3
Food Use Dom. Consump.	50	31	55	25	0	25
Feed,Seed,Waste Dm.Cn.	0	0	0	0	0	0
TOTAL Dom. Consumption	58	33	67	28	0	28
Ending Stocks	5	0	5	0	0	0
TOTAL DISTRIBUTION	65	35	75	30	0	30
Calendar Year Imports	60	25	70	30	0	0
Calendar Yr Imp. U.S.	10	6	10	10	0	0
Calendar Year Exports	5	19	5	10	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Meals

PSD Table						
Country	France					
Commodity	Meal, Rapeseed				(1000 MT)(PERC ENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Crush	1103	1103	1300	1400	0	1200
Extr. Rate, 999.9999	0.558477	0.558477	0.56	0.557143	ERR	0.558333
Beginning Stocks	40	40	23	23	26	53
Production	616	616	728	780	0	670
MY Imports	384	384	390	320	0	390
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	280	365	280	300	0	380
TOTAL SUPPLY	1040	1040	1141	1123	26	1113
MY Exports	87	87	70	90	0	80
MY Exp. to the EC	80	80	85	85	0	75
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	930	930	1045	980	0	980
TOTAL Dom. Consumption	930	930	1045	980	0	980
Ending Stocks	23	23	26	53	0	53
TOTAL DISTRIBUTION	1040	1040	1141	1123	0	1113
Calendar Year Imports	330	392	390	320	0	350
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	90	55	70	90	0	80
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Meal, Sunflowers eed				(1000 MT)(PERC ENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Crush	1357	1320	1400	1250	0	1300
Extr. Rate, 999.9999	0.526898	0.530303	0.528571	0.528	ERR	0.526923
Beginning Stocks	21	21	26	26	26	36
Production	715	700	740	660	0	685
MY Imports	396	384	380	400	0	400
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	136	136	140	150	0	150
TOTAL SUPPLY	1132	1105	1146	1086	26	1121
MY Exports	108	138	100	120	0	130
MY Exp. to the EC	105	130	100	110	0	110
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	998	941	1020	930	0	940
TOTAL Dom. Consumption	998	941	1020	930	0	940
Ending Stocks	26	26	26	36	0	51
TOTAL DISTRIBUTION	1132	1105	1146	1086	0	1121
Calendar Year Imports	370	668	380	400	0	400
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	96	83	100	110	0	120
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Meal, Soybean				(1000 MT)(PERC ENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Crush	462	462	410	450	0	440
Extr. Rate, 999.9999	0.779221	0.80303	0.804878	0.8	ERR	0.795455
Beginning Stocks	7	7	4	4	4	4
Production	360	371	330	360	0	350
MY Imports	3977	3980	4000	3940	0	3950
MY Imp. from U.S.	3	3	5	3	0	3
MY Imp. from the EC	587	587	590	600	0	600
TOTAL SUPPLY	4344	4358	4334	4304	4	4304
MY Exports	49	49	60	20	0	20
MY Exp. to the EC	29	29	60	15	0	15
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	4291	4305	4270	4280	0	4280
TOTAL Dom. Consumption	4291	4305	4270	4280	0	4280
Ending Stocks	4	4	4	4	0	4
TOTAL DISTRIBUTION	4344	4358	4334	4304	0	4304
Calendar Year Imports	3700	3939	3700	3950	0	3950
Calendar Yr Imp. U.S.	50	3	50	3	0	3
Calendar Year Exports	40	39	40	30	0	20
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Meal, Peanut				(1000 MT)(PERC ENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Crush	8	2	12	3	0	3
Extr. Rate, 999.9999	0.5	0	0.5	0.666667	ERR	0.666667
Beginning Stocks	5	5	0	5	0	5
Production	4	0	6	2	0	2
MY Imports	115	133	125	130	0	130
MY Imp. from U.S.	5	0	5	0	0	0
MY Imp. from the EC	12	9	11	10	0	10
TOTAL SUPPLY	124	138	131	137	0	137
MY Exports	1	1	2	1	0	1
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	123	132	129	131	0	131
TOTAL Dom. Consumption	123	132	129	131	0	131
Ending Stocks	0	5	0	5	0	5
TOTAL DISTRIBUTION	124	138	131	137	0	137
Calendar Year Imports	112	112	120	130	0	130
Calendar Yr Imp. U.S.	0	0	0	5	0	0
Calendar Year Exports	1	1	2	2	0	1
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Meal, Fish				(1000 MT)(PERCENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Catch For Reduction	0	0	0	0	0	0
Extr. Rate, 999.9999	ERR	ERR	ERR	ERR	ERR	ERR
Beginning Stocks	0	0	0	0	0	0
Production	20	20	20	20	0	20
MY Imports	84	91	90	90	0	90
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	11	15	11	15	0	15
TOTAL SUPPLY	104	111	110	110	0	110
MY Exports	10	15	10	15	0	15
MY Exp. to the EC	8	11	8	10	0	10
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	94	96	100	95	0	95
TOTAL Dom. Consumption	94	96	100	95	0	95
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	104	111	110	110	0	110
Calendar Year Imports	84	91	90	90	0	90
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	11	17	11	15	0	15
Calndr Yr Exp. to U.S.	0	1	0	0	0	0

Oils

PSD Table						
Country	France					
Commodity	Oil, Rapeseed				(1000 MT)(PERC ENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Crush	1103	1103	1300	1400	0	1200
Extr. Rate, 999.9999	0.412511	0.412511	0.417692	0.412143	ERR	0.4125
Beginning Stocks	9	9	10	10	30	52
Production	455	455	543	577	0	495
MY Imports	96	96	90	100	0	95
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	96	96	90	100	0	95
TOTAL SUPPLY	560	560	643	687	30	642
MY Exports	229	229	220	230	0	250
MY Exp. to the EC	85	85	90	90	0	90
Industrial Dom. Consum	130	130	293	305	0	250
Food Use Dom. Consump.	191	191	100	100	0	100
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	321	321	393	405	0	350
Ending Stocks	10	10	30	52	0	42
TOTAL DISTRIBUTION	560	560	643	687	0	642
Calendar Year Imports	100	114	90	100	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	220	195	220	220	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oil, Sunflowers eed				(1000 MT)(PERC ENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		08/1998		08/1999		08/2000
Crush	1357	1320	1400	1250	0	1300
Extr. Rate, 999.9999	0.423729	0.423485	0.42	0.4232	ERR	0.423077
Beginning Stocks	78	78	78	78	100	78
Production	575	559	588	529	0	550
MY Imports	159	159	200	170	0	170
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	158	135	175	150	0	150
TOTAL SUPPLY	812	796	866	777	100	798
MY Exports	270	297	260	250	0	250
MY Exp. to the EC	204	204	190	180	0	180
Industrial Dom. Consum	40	30	40	30	0	30
Food Use Dom. Consump.	424	391	466	419	0	440
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	464	421	506	449	0	470
Ending Stocks	78	78	100	78	0	78
TOTAL DISTRIBUTION	812	796	866	777	0	798
Calendar Year Imports	160	152	175	180	0	170
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	260	263	260	250	0	250
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oil, Soybean				(1000 MT)(PERC ENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Crush	462	462	410	450	0	440
Extr. Rate, 999.9999	0.177489	0.177489	0.178049	0.162222	ERR	0.170455
Beginning Stocks	4	4	1	1	1	1
Production	82	82	73	73	0	75
MY Imports	49	49	50	50	0	50
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	49	49	50	50	0	50
TOTAL SUPPLY	135	135	124	124	1	126
MY Exports	79	79	75	75	0	75
MY Exp. to the EC	6	6	4	4	0	4
Industrial Dom. Consum	40	40	36	36	0	35
Food Use Dom. Consump.	15	15	12	12	0	12
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	55	55	48	48	0	47
Ending Stocks	1	1	1	1	0	4
TOTAL DISTRIBUTION	135	135	124	124	0	126
Calendar Year Imports	50	44	50	50	0	50
Calendar Yr Imp. U.S.	0	2	0	0	0	0
Calendar Year Exports	90	73	80	75	0	75
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oil, Peanut				(1000 MT)(PERCENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Crush	8	2	12	3	0	3
Extr. Rate, 999.9999	0.5	0.5	0.5	0.666667	ERR	0.666667
Beginning Stocks	3	3	3	6	3	6
Production	4	1	6	2	0	2
MY Imports	75	68	75	70	0	70
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	20	15	20	15	0	15
TOTAL SUPPLY	82	72	84	78	3	78
MY Exports	30	18	30	20	0	20
MY Exp. to the EC	28	13	28	15	0	15
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	49	48	51	52	0	52
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	49	48	51	52	0	52
Ending Stocks	3	6	3	6	0	6
TOTAL DISTRIBUTION	82	72	84	78	0	78
Calendar Year Imports	75	76	75	70	0	70
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	25	21	25	20	0	20
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oil, Fish				(1000 MT)(PERCENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Catch For Reduction	0	0	0	0	0	0
Extr. Rate, 999.9999	ERR	ERR	ERR	ERR	ERR	ERR
Beginning Stocks	0	0	0	0	0	0
Production	3	3	3	3	0	3
MY Imports	30	32	30	35	0	35
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	18	16	18	15	0	15
TOTAL SUPPLY	33	35	33	38	0	38
MY Exports	11	13	11	16	0	16
MY Exp. to the EC	11	12	11	10	0	10
Industrial Dom. Consum	5	5	5	5	0	5
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	17	17	17	17	0	17
TOTAL Dom. Consumption	22	22	22	22	0	22
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	33	35	33	38	0	38
Calendar Year Imports	30	37	30	30	0	35
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	10	14	10	10	0	15
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oil, Olive				(1000 HA)(1000 TREES)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		11/1998		11/1999		11/2000
Area Planted	13	13	13	13	0	13
Area Harvested	13	13	13	13	0	13
Trees	3000	3000	3000	3000	0	3000
Beginning Stocks	10	9	10	7	10	6
Production	2	3	3	3	0	3
MY Imports	80	77	80	78	0	78
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	75	76	80	76	0	76
TOTAL SUPPLY	92	89	93	88	10	87
MY Exports	6	6	6	6	0	5
MY Exp. to the EC	5	4	5	4	0	4
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	76	76	77	76	0	76
Feed Waste Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	76	76	77	76	0	76
Ending Stocks	10	7	10	6	0	6
TOTAL DISTRIBUTION	92	89	93	88	0	87
Calendar Year Imports	80	81	80	80	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	6	6	6	6	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	France					
Commodity	Oil, Palm				(1000 HA)(1000 TREES)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	0	0	0	0	0	0
Area Harvested	0	0	0	0	0	0
Trees	0	0	0	0	0	0
Beginning Stocks	1	0	2	0	1	0
Production	0	0	0	0	0	0
MY Imports	112	105	110	105	0	105
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	100	92	100	90	0	90
TOTAL SUPPLY	113	105	112	105	1	105
MY Exports	2	2	3	2	0	2
MY Exp. to the EC	2	2	3	2	0	2
Industrial Dom. Consum	40	38	40	38	0	38
Food Use Dom. Consump.	69	65	68	65	0	65
Feed Waste Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	109	103	108	103	0	103
Ending Stocks	2	0	1	0	0	0
TOTAL DISTRIBUTION	113	105	112	105	0	105
Calendar Year Imports	112	112	110	110	0	110
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	2	2	3	2	0	2
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Trade Matrices

Oilseeds

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Rapeseed		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Germany	981752		n/a
Belgium	472279		n/a
China	222000		n/a
Netherlands	181722		n/a
UK	127285		n/a
Bangladesh	120928		n/a
Canada	56414		n/a
Japan	52080		n/a
Mexico	40019		n/a
Pakistan	25352		n/a
Total for Others	2279831		0
Others not Listed	65365		n/a
Grand Total	2345196		0

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Rapeseed		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	18467	U.S.	n/a
Others		Others	
Belgium	9823		n/a
UK	8944		n/a
Germany	1847		n/a
Netherlands	1156		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	21770		0
Others not Listed	504		n/a
Grand Total	40741		0

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Sunflower seed		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.	18	U.S.	n/a
Others		Others	
Belgium	170480		n/a
Spain	121456		n/a
Germany	81542		n/a
Netherlands	65377		n/a
Portugal	29836		n/a
Morocco	19030		n/a
Switzerland	6998		n/a
Denmark	4177		n/a
UK	1539		n/a
			n/a
Total for Others	500435		0
Others not Listed	444		n/a
Grand Total	500897		0

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Sunflower seed		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	14235	U.S.	n/a
Others		Others	
Ukraine	178761		n/a
Argentina	170797		n/a
Russia	23981		n/a
Italy	2639		n/a
Netherlands	1906		n/a
Spain	1029		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	379113		0
Others not Listed	2412		n/a
Grand Total	395760		0

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Soybean		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Spain	16027		n/a
Germany	1996		n/a
Portugal	1235		n/a
Switzerland	1083		n/a
Netherlands	554		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	20895		0
Others not Listed	793		n/a
Grand Total	21688		0

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Soybean		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	223175	U.S.	n/a
Others		Others	
Brazil	260790		n/a
Netherlands	25588		n/a
Belgium	19417		n/a
Paraguay	10383		n/a
Spain	4931		n/a
South Africa	1469		n/a
Canada	549		n/a
Italy	528		n/a
			n/a
			n/a
Total for Others	323655		0
Others not Listed	2255		n/a
Grand Total	549085		0

Export Trade Matrix			
Country	France		
Commodity	Oilseed, Peanut		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Italy	1390		n/a
Netherlands	336		n/a
Algeria	163		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	1889		0
Others not Listed	126		n/a
Grand Total	2015		0

Import Trade Matrix			
Country	France		
Commodity	Oilseed, Peanut		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	7026	U.S.	n/a
Others		Others	
Argentina	8148		n/a
China	3954		n/a
Netherlands	3738		n/a
UK	966		n/a
Germany	302		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	17108		0
Others not Listed	1180		n/a
Grand Total	25314		0

Meals

Export Trade Matrix			
Country	France		
Commodity	Meal, Rapeseed		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Spain	34125		n/a
UK	33721		n/a
Ireland	8018		n/a
Italy	3299		n/a
Israel	3150		n/a
Sierra Leone	2200		n/a
Greece	1300		n/a
			n/a
			n/a
			n/a
Total for Others	85813		0
Others not Listed	934		n/a
Grand Total	86747		0

Import Trade Matrix			
Country	France		
Commodity	Meal, Rapeseed		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
UK	146174		n/a
Belgium	144024		n/a
Germany	66527		n/a
Poland	10614		n/a
Netherlands	6995		n/a
Brazil	6414		n/a
Thailand	2420		n/a
			n/a
			n/a
			n/a
Total for Others	383168		0
Others not Listed	1318		n/a
Grand Total	384486		0

Export Trade Matrix			
Country	France		
Commodity	Meal, Sunflower seed		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Ireland	56654		n/a
UK	46637		n/a
Spain	24301		n/a
Portugal	7527		n/a
Greece	2347		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	137466		0
Others not Listed	727		n/a
Grand Total	138193		0

Import Trade Matrix			
Country	France		
Commodity	Meal, Sunflower seed		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Argentina	243614		n/a
Belgium	85864		n/a
Netherlands	195584		n/a
Spain	16632		n/a
Germany	9280		n/a
Ireland	2910		n/a
Rumania	2017		n/a
Paraguay	1646		n/a
			n/a
			n/a
Total for Others	557547		0
Others not Listed	2335		n/a
Grand Total	559882		0

Export Trade Matrix			
Country	France		
Commodity	Meal, Soybean		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Greece	14040		n/a
Italy	12361		n/a
Algeria	7720		n/a
Switzerland	6626		n/a
Malta	5560		n/a
Belgium	1355		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	47662		0
Others not Listed	1636		n/a
Grand Total	49298		0

Import Trade Matrix			
Country	France		
Commodity	Meal, Soybean		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	2786	U.S.	n/a
Others		Others	
Brazil	2975386		n/a
Argentina	401838		n/a
Belgium	366640		n/a
Netherlands	104244		n/a
Germany	72280		n/a
Spain	38701		n/a
Liberia	10287		n/a
Sweden	1849		n/a
			n/a
			n/a
Total for Others	3971225		0
Others not Listed	3361		n/a
Grand Total	3977372		0

Export Trade Matrix			
Country	France		
Commodity	Meal, Peanut		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Belgium	1015		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	1015		0
Others not Listed	194		n/a
Grand Total	1209		0

Import Trade Matrix			
Country	France		
Commodity	Meal, Peanut		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Sudan	62333		n/a
Senegal	51660		n/a
Argentina	9598		n/a
Belgium	6796		n/a
Netherlands	1859		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	132246		0
Others not Listed	614		n/a
Grand Total	132860		0

Export Trade Matrix			
Country	France		
Commodity	Meal, Fish		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	149	U.S.	n/a
Others		Others	
Belgium	5008		n/a
Netherlands	2395		n/a
Russia	1200		n/a
Greece	1027		n/a
UK	897		n/a
Spain	674		n/a
India	650		n/a
Taiwan	575		n/a
Germany	367		n/a
Italy	263		n/a
Total for Others	13056		0
Others not Listed	1524		n/a
Grand Total	14729		0

Import Trade Matrix			
Country	France		
Commodity	Meal, Fish		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	22	U.S.	n/a
Others		Others	
Peru	30948		n/a
Norway	21885		n/a
Chile	11102		n/a
Iceland	7936		n/a
Netherlands	5988		n/a
Belgium	3714		n/a
Faroe	3538		n/a
Denmark	2070		n/a
Germany	1682		n/a
Spain	1001		n/a
Total for Others	89864		0
Others not Listed	1225		n/a
Grand Total	91111		0

Oils

Export Trade Matrix			
Country	France		
Commodity	Oil, Rapeseed		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.	1	U.S.	n/a
Others		Others	
UK	49328		n/a
Algeria	48493		n/a
India	40770		n/a
Italy	19403		n/a
Tunisia	18150		n/a
Morocco	16050		n/a
Netherlands	8429		n/a
Belgium	7703		n/a
Turkey	7308		n/a
Spain	5287		n/a
Total for Others	220921		0
Others not Listed	7703		n/a
Grand Total	228625		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Rapeseed		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Belgium	46822		n/a
Germany	32869		n/a
UK	8130		n/a
Netherlands	6831		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	94652		0
Others not Listed	1538		n/a
Grand Total	96190		0

Export Trade Matrix			
Country	France		
Commodity	Oil, Sunflower seed		
Time period	July-June	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
UK	57108		n/a
Algeria	54489		n/a
Belgium	37046		n/a
Italy	30763		n/a
Netherlands	27600		n/a
Spain	20666		n/a
Germany	15576		n/a
Greece	13337		n/a
India	8000		n/a
Russia	4687		n/a
Total for Others	269272		0
Others not Listed	28351		n/a
Grand Total	297623		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Sunflower seed		
Time period	July-June	Units:	MT
Imports for:	1998		1999
U.S.	28	U.S.	n/a
Others		Others	
Belgium	94489		n/a
Argentina	23505		n/a
Spain	15756		n/a
Netherlands	11149		n/a
Germany	8937		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	153836		0
Others not Listed	5350		n/a
Grand Total	159214		0

Export Trade Matrix			
Country	France		
Commodity	Oil, Soybean		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Morocco	16160		n/a
Turkey	11950		n/a
Egypt	10403		n/a
Senegal	8013		n/a
Lebanon	3816		n/a
Portugal	2999		n/a
Russia	2131		n/a
UK	1672		n/a
Belgium	1575		n/a
Israel	1030		n/a
Total for Others	59749		0
Others not Listed	19580		n/a
Grand Total	79329		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Soybean		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	13	U.S.	n/a
Others		Others	
Netherlands	22580		n/a
Belgium	15556		n/a
Germany	9610		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	47746		0
Others not Listed	1469		n/a
Grand Total	49228		0

Export Trade Matrix			
Country	France		
Commodity	Oil, Peanut		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	3	U.S.	n/a
Others		Others	
Belgium	6166		n/a
Tunisia	3000		n/a
Italy	2814		n/a
UK	1790		n/a
Germany	1193		n/a
Switzerland	561		n/a
Portugal	434		n/a
Spain	369		n/a
			n/a
			n/a
Total for Others	16327		0
Others not Listed	1628		n/a
Grand Total	17958		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Peanut		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Senegal	31386		n/a
Argentina	19862		n/a
Belgium	13871		n/a
Sudan	1886		n/a
Netherlands	989		n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	67994		0
Others not Listed	235		n/a
Grand Total	68229		0

Export Trade Matrix			
Country	France		
Commodity	Oil, Fish		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	15	U.S.	n/a
Others		Others	
Italy	4648		n/a
Germany	4077		n/a
Spain	1746		n/a
UK	1054		n/a
Belgium	368		n/a
Netherlands	245		n/a
Switzerland	178		n/a
			n/a
			n/a
			n/a
Total for Others	12316		0
Others not Listed	310		n/a
Grand Total	12641		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Fish		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	14	U.S.	n/a
Others		Others	
Denmark	8771		n/a
Iceland	8023		n/a
Spain	5081		n/a
Norway	4192		n/a
Peru	2007		n/a
Germany	831		n/a
UK	483		n/a
Netherlands	434		n/a
			n/a
			n/a
Total for Others	29822		0
Others not Listed	1917		n/a
Grand Total	31753		0

Export Trade Matrix			
Country	France		
Commodity	Oil, Olive		
Time period	Nov/Oct	Units:	MT
Exports for:	1998		1999
U.S.	179	U.S.	n/a
Others		Others	
Spain	1155		n/a
Greece	889		n/a
Belgium	783		n/a
Italy	540		n/a
Morocco	300		n/a
Germany	276		n/a
UK	239		n/a
Switzerland	95		n/a
Portugal	63		n/a
Japan	62		n/a
Total for Others	4402		0
Others not Listed	1048		n/a
Grand Total	5629		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Olive		
Time period	Nov/Oct	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Spain	47802		n/a
Italy	25516		n/a
Greece	1241		n/a
Tunisia	683		n/a
Portugal	597		n/a
Belgium	408		n/a
Germany	132		n/a
UK	114		n/a
Netherlands	105		n/a
Turkey	97		n/a
Total for Others	76695		0
Others not Listed	31		n/a
Grand Total	76726		0

Export Trade Matrix			
Country	France		
Commodity	Oil, Palm		
Time period	Oct/Sept	Units:	MT
Exports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Germany	667		n/a
Belgium	353		n/a
UK	344		n/a
Italy	127		n/a
			n/a
			n/a
			n/a
			n/a
			n/a
			n/a
Total for Others	1491		0
Others not Listed	225		n/a
Grand Total	1716		0

Import Trade Matrix			
Country	France		
Commodity	Oil, Palm		
Time period	Oct/Sept	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	n/a
Others		Others	
Netherlands	54497		n/a
Belgium	25565		n/a
Indonesia	10057		n/a
Italy	5305		n/a
UK	3710		n/a
Germany	2376		n/a
Denmark	1463		n/a
Malaysia	1116		n/a
Spain	679		n/a
			n/a
Total for Others	104768		0
Others not Listed	299		n/a
Grand Total	105067		0

Section III: Narrative on Supply, Demand, Policy and Marketing

Production

Oilseeds

The total area planted to oilseeds in France is expected to decrease by 6 percent from 2.28 million ha in 1999 to 2.14 million ha in 2000. This is due to lower oilseed prices and to the reduced payments to oilseed growers set by the reformed EU policy, aiming at adjusting oilseed payments to grain payments.

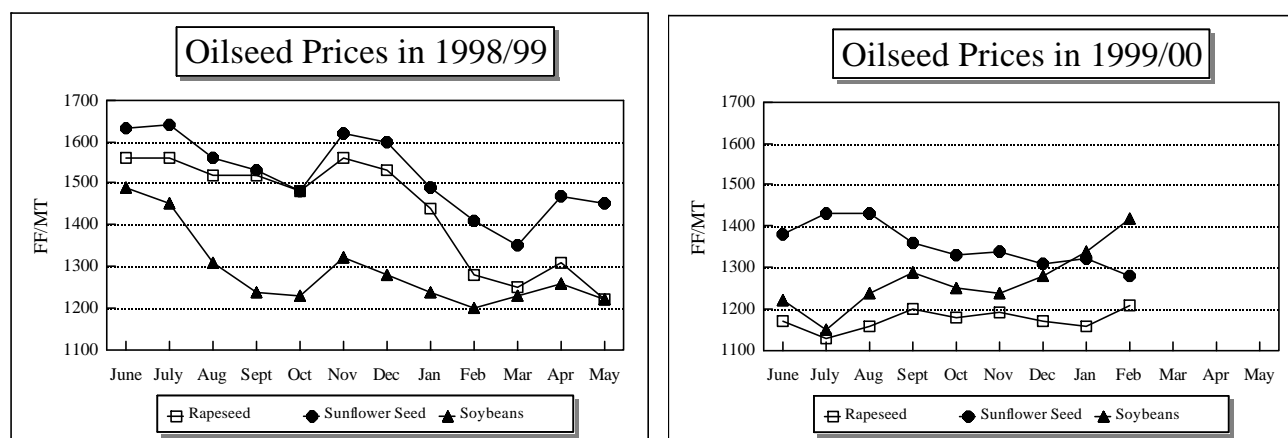
Rapeseed and sunflower seed area and production are shown below for 1998/99, 1999/00 and 2000/01:

Rapeseed	1998/99		1999/00		2000/01	
	Area (ha)	Production (MT)	Area (ha)	Production (MT)	Area (ha)	Production (MT)
Industrial	155,000	487,000	320,000	1,040,000	314,000	1,000,000
Food/Feed	985,000	3,213,000	1,035,000	3,360,000	936,000	3,000,000
Total	1,140,000	3,700,000	1,355,000	4,400,000	1,250,000	4,000,000

Sunflower Seeds	1998/99		1999/2000		2000/01	
	Area (ha)	Production (MT)	Area (ha)	Production (MT)	Area (ha)	Production (MT)
Industrial	40,000	85,000	78,000	175,000	60,000	126,000
Food/Feed	765,000	1,595,000	752,000	1,735,000	740,000	1,554,000
Total	805,000	1,680,000	830,000	1,910,000	800,000	1,680,000

In 2000/01, the forecast is for a total area planted to oilseeds for food and feed use of 1,766,000 ha, including 936,000 ha rapeseed, 740,000 ha sunflower seed, and 90,000 ha soybeans. Under the EU policy, this total is higher than the French maximum guaranteed area of 1,557,000 ha, but penalties are implemented only if the total EU oilseed area is exceeded.

In 1999, France organized a GMO-free traced soybean production called "Soja de Pays." There were 2,000 farmers growing GMO-free traced soybean on 20,000 ha, producing 55,000 MT, i.e., 21 percent of the French soybean production. In 2000, 6,000 French growers are expected to plant "Soja de Pays" on 55,000 ha, producing 135,000 MT, or 58 percent of the French production.



The two graphs above illustrate the fluctuations in oilseed prices in 1998/99 and 1999/00. These are free along side (FAS) prices for rapeseed and sunflower seeds, and Rotterdam CIF prices for soybeans. June is the first month of quotation for the newly harvested rapeseed and sunflower seed in France.

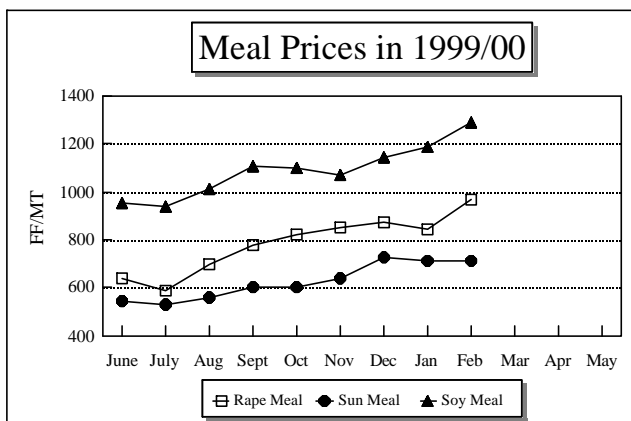
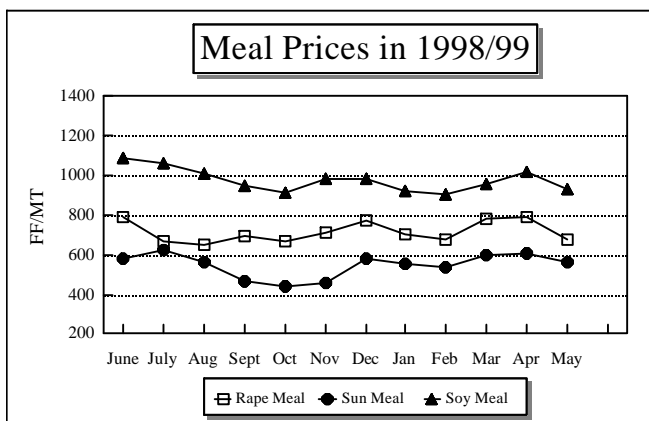
Prices for rapeseed, sunflower seed and soybeans have been significantly lower in 1999/00 compared to 1998/99. This was due mainly to low prices for oils. Since rapeseed was the most price-competitive seed, exports, crush and feed use of rapeseed increased significantly from 1998/99 to 1999/00.

Meals

French meal production in CY 1998, CY 1999 and MY 1998/99 (October/September) was broken down as follows (in MT):

	CY 1998	CY 1999	MY 1998/99
Sunflower Meal	693,644	667,639	726,021
Rapeseed Meal	603,893	632,278	584,493
Soybean Meal	437,742	362,745	371,260
Peanut Meal	14,802	25	25
Flaxseed Meal	9	4	5
TOTAL MEALS	1,750,090	1,662,691	1,681,800

Sunflower meal is the major meal produced in France, while the largest domestic demand is for soybean meal. This explains the large imports of soybeans to be crushed and of soybean meal for animal feed consumption.

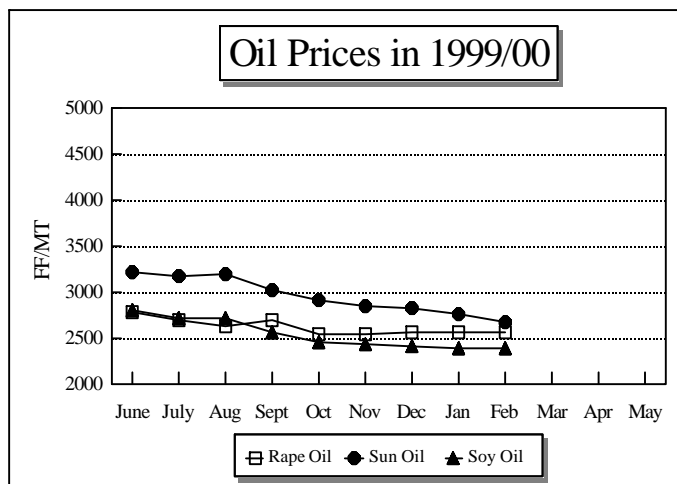
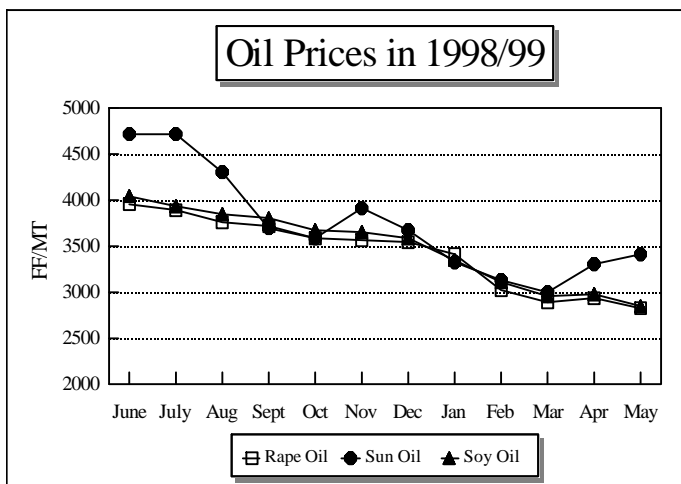


Meal price fluctuations during MY 1998/99 are illustrated in the above graphs. Rapeseed meal and sunflower meal prices shown are plant gate prices, while soybean meal prices are FOB Hamburg prices.

An increase of all meals was observed in MY 1999/00, due to increased Asian demand for proteins compared to a lower world production.

Oils

The fluctuation of oil prices during MY 1998/99 and 1999/00 are illustrated in the graph below:



Following the significant decline in oil prices during MY 1998/99, dragged down by the decrease in palm oil prices and the low world demand, prices continued to decline in 1999/00. This was due to increased world production and stocks, compared with limited demand.

Consumption

Oilseeds

The French crushing capacity totals 3.2 million MT seeds per year. The quantities of seeds crushed in CY 1998 and 1999 included the following (in MT of seeds):

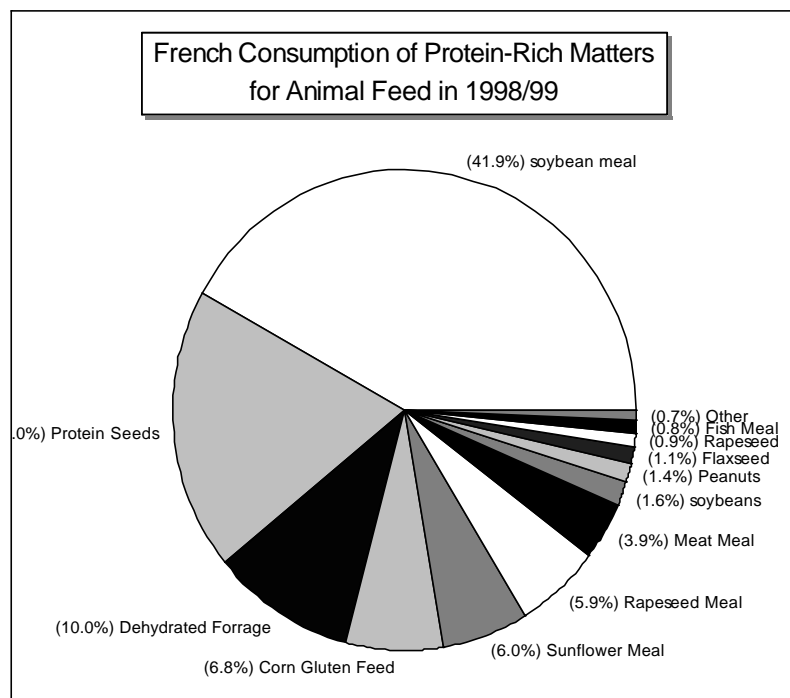
	1998	1999
Sunflower Seeds	1,249,674	1,111,251
Rapeseed	1,071,692	1,050,830
Soybeans	557,460	403,060
Peanuts	29,468	56
Flaxseed	16	8
Others	1,158	1,026
TOTAL	2,909,468	2,566,231

Meals

French meal consumption in CY 1998, CY 1999 and MY 1998/99 (October/September) was as follows (in MT):

	CY 1998	CY 1999	MY 1998/99
Soybean Meal	4,343,884	4,271,131	3,304,970
Sunflower Meal	916,571	1,051,604	1,015,610
Rapeseed Meal	851,819	970,821	906,055
Peanut Meal	172,267	110,459	131,687
Flaxseed Meal	108,069	115,748	110,863
Castor Meal	35,752	23,020	20,525
Copra Palm Meal	58,277	45,474	46,309
Cotton Meal	33,018	15,585	18,529
TOTAL MEALS	6,519,657	6,603,842	6,554,550

Soybean meal is by far the major meal used in France, compared with sunflower and rapeseed meals.



According to the French feed industry, the consumption of protein-rich matters (PRM) for animal feed was distributed as shown in the opposite graph in 1998/99. Total French consumption of PRM for animal feed in France amounted to 10,169,000 MT.

Note: PRM account for approximately 27 percent of total raw material consumption for animal feed, i.e., half of cereal consumption.

Trade

There may be a trade opportunity for U.S. products to France if a European or French ban on meat meals in animal feed is imposed, as a measure against the spread of Bovine Spongiform Encephalopathy (BSE). In that case, animal proteins would have to be replaced by plant proteins produced domestically or imported from third countries. French oilseed growers estimate that the area planted to oilseeds in Europe would have to be increased by 30 percent, i.e., 2 million ha, or that EU imports of soybean meal would increase by 10 percent.

Policy

General EU Policy for Oilseeds

Compensatory payments for oilseeds harvested in 1999 increased from 1998 because the EU maximum guaranteed area for oilseeds was not exceeded in 1998. The following table gives payments in USD per hectare for each payment zone. Zone I covers most of France except southwestern regions and Zone II consists of southwestern regions.

		Rapeseed and Sunflower Seed	Non irrigated Soybeans	Irrigated Soybeans
1998	Zone I	518.5	510.5	685.1
	Zone II	478.1	402.9	739.8
1999	Zone I	595.9	585.1	795.8
	Zone II	548.0	461.8	859.5

Note: The exchange rates used in this table are as follows:

1998: 1 USD = 5.90 FF

1999: 1 USD = 6.15 FF

Although France exceeded its maximum guaranteed area (MGA) for oilseeds in 1999, the total EU MGA was not exceeded, and there was therefore no penalty set by the EU Commission for oilseed growers' payments. In 2000, there will be no difference among EU payments for rapeseed, sunflower seed and soybeans, according to the Common Agricultural Policy (CAP). Oilseed subsidies will gradually decline to be at the same level as cereal subsidies for the 2002 harvest.

Specific French Policy for Oilseeds

As part of the rural development support program of Agenda 2000, FF 300 million (USD 48.8 million) is allocated to sunflower seed growers producing sunflower seed under certain specific environment-friendly conditions. Half of this sum comes from the French Ministry of Agriculture; the other half comes from the EU. This measure was implemented to prevent the EU sunflower seed production from declining sharply because of low returns and declining EU payments.

The GOF provided FF 100 million (USD 16.3 million) in 1999 to French soybean growers for "quality soybean," which includes GMO-free "Soja de Pays." This support is an incentive to grow soybeans in France despite the termination of the specific support for irrigated soybean production in 2000.

French Oilseed Growers Positions

French oilseed growers (FOP) have recently called for the elimination of the Blair House Agreement limits on food/feed oilseed production (maximum guaranteed area) and industrial oilseed production (limit set at 1 million MT soybean meal equivalent) in 2002, i.e., when EU payments for oilseeds will equal EU payments for grains.

The FOP has denounced U.S. oilseed policy, holding that it stimulates soybean production even when market prices are low and world supply high.